

**County of San Diego  
Health and Human Services Agency  
Adult/Older Adult Mental Health Services Business Plan  
Fiscal Years 2003/04 and 2004/05**

Adult/Older Adult Mental Health Services (AMHS) is the Health and Human Services Agency division that is responsible for delivering mental health services to adults ages 18 and over, with some specialty services for transitional aged youth 18 – 21 and senior adults aged 55 or older. The core service population for AMHS consists of adults and older adults who are eligible for Medi-Cal and uninsured, indigent adults and older adults with serious and persistent mental illness requiring mental health services. AMHS is centrally administered from its Mission Valley headquarters, has several centrally administrated programs (San Diego County Psychiatric Hospital, Forensic Services and Conservatorship), with the majority of services provided in regionally organized programs (outpatient clinics, day treatment, client socialization clubhouses, transitional housing, crisis residential and long term care). Case Management services are both centralized in the Morena area and regionalized in several outpatient clinic sites. Programs are both County operated (40%) and under contract (60%).

## Communities

### Promote Safe and Livable Communities

#### Strategic Goal: **Strengthen Regional Security**

Operational Objective	Activities	Measure & Target	Target Date	Lead
Achieve 14 federal and state "critical benchmarks" for bioterrorism preparedness by December 2005	By October 2003, ensure appropriate Adult Mental Health Services staff participate in bioterrorism preparedness training to achieve Agency wide training goal of 75%	Formulate and implement a bioterrorism preparedness training plan	October 2003	Karen Hogan/ Linda Cannon
	By January 2004, finalize site-specific Business Continuation Plan	Complete Business Continuation Plans for all AMHS sites	January 2004	Karen Hogan/ Linda Cannon
Provide training to 75% Agency staff in bioterrorism preparedness	By October 2003, ensure appropriate Adult Mental Health Services staff participate in bioterrorism preparedness training to achieve Agency wide training goal of 75%	Monitor participation in bioterrorism preparedness training to assure achievement of training goal of 75%	October 2003	Karen Hogan/ Linda Cannon

## Strategic Goal: **Promote Health, Wellness, and Self-Sufficiency**

Operational Objective	Activities	Measure & Target	Target Date	Lead
Provide eligible adults timely access to mental health outpatient treatment (within 28 days)	➤ Beginning July 2003, track and monitor access data for outpatient programs on a monthly basis and make necessary adjustments for improvement as indicated by data	Access to Outpatient Assessment: number of days between request and outpatient assessment	June 2004	Liz Biolley/ Candace Milow
	➤ Implement Service Eligibility Policy	Training provided to County and contract programs and monitoring plan implemented	June 2004	Karen Hogan/ Peter McKimmin (County)  Piedad Garcia (Contracts)
Ensure that no more than 23% of patients discharged from psychiatric hospitalization are readmitted within 30 days of their release	Beginning July 2003, track and monitor access data for inpatient programs on a monthly basis and make necessary adjustments for improvement as indicated by data	Monitor monthly recidivism reports and develop action plans as needed	June 2004	Liz Biolley/ Candace Milow
Reduce average length of stay in day rehabilitation programs	➤ Continue implementation of new authorization requirements	5% reduction in average length of stay	June 2005	Liz Biolley/ Candace Milow
	➤ Expand capacity of client run social/vocational programs	Formulate plan and coordinate expansion with client-run programs	June 2005	Piedad Garcia

Operational Objective	Activities	Measure & Target	Target Date	Lead
Increase penetration rates for Latino and Asian/Pacific Islander populations	Targeted outreach activities such as broadcasts on Spanish language radio stations and implementation of recommendations from Latino Access study	Increase in penetration rates to 2.6% for Latinos and 3.3% for Asians/Pacific Islanders  (Data Source: InSyst)	June 2005	Liz Biolley/ Candace Milow
In conjunction with Aging and Independence Services, continue efforts to improve and enhance the Mental Health Senior Team	Beginning July 2003, in collaboration with Aging and Independence Services, initiate the development of policies and procedures for Senior Team	Formulate action plan and complete policies and procedures for operation of the Senior Team	June 2005	Mark Refowitz
Continue to augment coordination of mental health services and alcohol/drug treatment services to improve the quality of behavioral health services, including programs which address the growing number of dually diagnosed cases	Beginning July 2003, begin quarterly committee monitoring and measurement of Behavioral Health key indicators	Monitor and measure Behavioral Health key indicators on a quarterly basis	June 2005	Mark Refowitz
In conjunction with Alcohol and Drug Services, continue to implement Dual Diagnosis Strategic Plan	In collaboration with Alcohol and Drug Services, continue to implement Dual Diagnosis Charter and Action Plan for AMHS, to the extent that resources are available	Develop welcoming policy, definition of dual diagnosis, identify data processes and continue with CADRE training	June 2004	Piedad Garcia
Continue to implement Strategic Housing Plan	Increase housing stock and continue with implementation of plan recommendations	Increase housing stock by applying for additional housing certificates (50) to expand housing capacity Continue to implement plan recommendations	June 2004  June 2005	Piedad Garcia
Continue to implement Older Adult Plan	Continue to implement Prevention and Ed. Wellness Campaign and develop OA clinical assessment	Implement three trainings for older adult organizational providers and aging network Identify and pilot clinical assessment for older adults	June 2004  June 2005	Piedad Garcia

Adult/Older Adult Mental Health Services Business Plan  
FY 2003/04 through 2004/05

Operational Objective	Activities	Measure & Target	Target Date	Lead
Continue to implement System Redesign	Continue with reprocurement of Central/North Central, South Region and Case Management RFPs	Release SOW for: Central/North Central	June 2004	Piedad Garcia
		South Region	January 2004	
		Case Management contracts	April 2004	
Continue to implement PSR Initiative	Continue to implement, monitor and track PSR evidence-based practice implementation	Provide four PSR trainings in the regions	June 2004	Piedad Garcia
		Continue to provide technical assistance to the regions in implementation of PSR initiative via the PSR Advisory Work Group	Ongoing	
		Monitor and track North County and East County PSR implementation	June 2004	
Implement Recommendation #1 from Vocational Services Report	Implement DR MOU and contract requirements	Develop plan to implement DR MOU	June 2005	Piedad Garcia
Implement Recommendation #2 from Vocational Services Report	Transform day rehabilitation programs into Fountainhouse Clubhouse Model in the South Region	Form work group to develop and implement transition plan to Fountainhouse Clubhouse Model	June 2005	Piedad Garcia

***“Required Disciplines”***  
Ensure Operational Excellence

**Strategic Goal: Ensure a High Level of Operational Excellence by Adhering to County Required Disciplines**

Operational Objective	Activities	Measure & Target	Target Date	Lead
Reimburse fund processing services from Special Funds and Trust Funds within 30 calendar days	Beginning July 2003:			Liz Biolley/ Robert Duval
	<ul style="list-style-type: none"> <li>➤ Assure that Mental Health Services trust fund reimburses County General Fund within 30 days of incurred cost</li> <li>➤ Certify expenditures from Tobacco Funds to Agency Budget Office within 30 days of expenditure</li> </ul>	<p>Implement monthly reconciliation of the Mental Health Trust Fund to ensure timely transfers</p> <p>Implement action plan for 30-day certification and follow up delayed certifications</p>	<p>June 2004</p> <p>June 2004</p>	
Reduce to zero the cost/revenue gap in the Five-Year Financial Forecast	<ul style="list-style-type: none"> <li>➤ Provide input to Five-Year Financial Forecast by February 2004</li> <li>➤ Manage to Adult Mental Health Services targets</li> </ul>	<p>Implement plan to ensure input by target date</p> <p>Formulate management plan based on AMHS targets</p>	<p>February 2004</p> <p>June 2005</p>	Liz Biolley/ Robert Duval

Operational Objective	Activities	Measure & Target	Target Date	Lead
Achieve additional revenues and/or decreased expenditures to achieve \$0 or positive year-end fund balance	Beginning July 2003: <ul style="list-style-type: none"> <li>➤ Monitor and manage Adult Mental Health Services expenditures to remain within budget</li> <li>➤ Earn or maximize revenue</li> <li>➤ Mitigate Adult Mental Health Services expenses in relation to revenue shortfalls</li> <li>➤ Eligibility technicians to be provided training and necessary equipment/software for them to assist indigent patients who qualify for Medi-Cal/SSI to apply for these benefits</li> </ul>	Develop and implement management plan to keep expenditures within budget, maximize revenue and mitigate expenses as needed	June 2005	Liz Biolley/ Robert Duval
		Develop plan to train eligibility technicians and provide equipment for assisting indigent patients to apply for Medi-Cal and SSI, and monitor implementation	June 2005	Liz Biolley/ Robert Duval  Karen Hogan/ Joyce Freow
Maintain or improve the customer satisfaction rating of 4.5 on a scale of 5	Beginning July 2003, develop continuous improvement plans and monitor to achieve targets	Formulate continuous improvement plans and develop monitoring mechanism	June 2005	Liz Biolley/ Candace Milow

Operational Objective	Activities	Measure & Target	Target Date	Lead
Demonstrate regional leadership by fostering a leadership role for San Diego County	Beginning July 2003: ➤ Actively participate on California Mental Health Directors Association Governing Board and attend at least 30% of all meetings	Formulate plan to ensure regular (30% minimum) attendance at meetings	June 2005	Mark Refowitz
	➤ Actively participate on California Mental Health Directors Association Medi-Cal Policy and Financial Workgroups through senior San Diego manager attendance at 75% of all meetings	Formulate plan to ensure regular (75% minimum) attendance at meetings	June 2005	Liz Biolley
	➤ Actively participate on California Mental Health Directors Association/ Adult Systems of Care Ethnic Services Managers Committee and attend 50% of all meetings	Formulate plan to ensure regular (50% minimum) attendance at meetings	June 2005	Piedad Garcia

Operational Objective	Activities	Measure & Target	Target Date	Lead
Foster and maintain a skilled and diverse workforce by fostering diversity, promoting employee development and training, succession planning, and maintaining employee satisfaction	Beginning July 2003:			
	➤ Ensure that 95% of all new hires attend Leveraging Diversity training within 90 days of hire	Formulate and implement plan for Leveraging Diversity training for new hires	June 2005	Liz Biolley/ Robert Duval
	➤ Report quarterly to Agency HR on diversity initiatives implemented in Adult Mental Health Services	Ensure that quarterly reports on diversity initiatives are submitted	June 2005	Mark Refowitz/ Marianne Wedemeyer
	➤ Ensure that 25% of Adult Mental Health Services employees either submit a new employee development plan or review and update their existing plan	Implement plan and follow up to ensure employee submission of individual development plans	June 2005	Liz Biolley/ Robert Duval
	➤ Beginning July 2003, collaborate with Agency HR to identify Adult Mental Health Services individuals to participate in training on employee performance strategies and training design	Coordinate "train-the-trainers" strategy with Agency HR	June 2005	Mark Refowitz
	By June 2003, participate in implementation of Agency's succession plan (developed in FY 02/03) as it is rolled out by Agency HR	Follow up closely with Agency HR to ensure active participation in succession plan	June 2003	Mark Refowitz
	By June 2004, distribute results of Employee Satisfaction Survey to all managers and supervisors and	Implement plan to ensure timely distribution of survey results to managers and supervisors	June 2004	Liz Biolley/ Candace Milow

Operational Objective	Activities	Measure & Target	Target Date	Lead
	develop a continuous improvement plan to address deficiencies	Monitor survey results to develop continuous improvement plan	June 2005	
	New Employee Orientation	Develop materials and implement for new employees	June 2005	Mark Refowitz/ Jerry Wilkins
Maximize the use of technology to improve efficient, effective information management needed to support County programs	<ul style="list-style-type: none"> <li>➤ Beginning September 2003, ensure appropriate region or division staff participates in Agency ERP deployment plan as necessary</li> <li>➤ Participate in a coalition of counties to select a new MIS system to replace InSyst and eCura</li> </ul>	<p>Coordinate participation in ERP deployment plan with Agency</p> <p>Issue RFP for new MIS system and make selection if funding is available</p>	June 2004	Liz Bolley/ Robert Duval
Ensure that no more than 3% of desktop computer have non-standard operating systems	Review and justify prior to submission all Adult Mental Health Services requests to deviate from County standard desktop operating systems during Fiscal Year 2003-04	3% or less non-standard operations systems. Review 100% of requests and flag those that are non-standard and bring to the attention of the director	June 2004	Liz Biolley/ Robert Duval
Promote and maintain the highest levels of accountability in all public services and operations by upholding ethical and legal standards	Beginning July 2003, continue to adhere to County legal and ethical conduct policy, and review Human Resources policy briefs with staff	Develop plan of action for monitoring AMHS actions to ensure adherence to legal and ethical conduct policy and ensure review with staff	June 2005	Mark Refowitz

Operational Objective	Activities	Measure & Target	Target Date	Lead
Ensure that 95% of contracts are monitored according to a monitoring plan	Beginning July 2003:			Piedad Garcia
	<ul style="list-style-type: none"> <li>➤ All external service contracts shall have a monitoring plan in accordance with Agency Manual of Policies and Procedures</li> <li>➤ All contracts shall be monitored in accordance with the plan</li> </ul>	<p>Review all contracts to ensure completion of monitoring plan</p> <p>Implement enforcement of monitoring in accordance with plan</p>	<p>June 2005</p> <p>June 2005</p>	

Operational Objective	Activities	Measure & Target	Target Date	Lead
Promote continuous improvement in the workplace as a fundamental part of the organization's culture and each employee's responsibility	➤ Beginning July 2003, develop and implement a Continuous Improvement Plan for Adult Mental Health Services that includes: Customer Service and Employee Satisfaction objectives, an energy conservation plan and a workplace safety plan	Develop and implement the Continuous Improvement Plan	June 2005	Liz Biolley/ Candace Milow
	➤ Continue regular meetings of the Mental Health Compliance Committee and actively resolve issues on the Billing and Claiming Process Improvement Plan	Billing and Claiming Process Improvement Plan documents substantial progress on all priority issues	June 2005	Liz Biolley/ Robert Duval
	➤ Conduct annual internal customer satisfaction survey of administrative support units and implement action plan to address deficiencies	Survey completed and action plan implemented	June 2004	Mark Refowitz/ Jerry Wilkins
	➤ Complete review and update of Admin (01) policies and procedures on a 3-year cycle	All P&Ps reviewed in a timely manner in accordance with 3-year review cycle	June 2005	Liz Biolley/ Candace Milow
	➤ Complete all priority P&Ps for all administrative functions		June 2005	Liz Biolley/ Candace Milow

Adult/Older Adult Mental Health Services Business Plan  
FY 2003/04 through 2004/05

Operational Objective	Activities	Measure & Target	Target Date	Lead
	➤ Complete position descriptions for those positions not completed during FY 02/03	Position descriptions completed for all positions	June 2005	Liz Biolley/ Robert Duval
	➤ Implement annual review of position descriptions in conjunction with performance reviews	P&P implemented for annual review process in conjunction with performance reviews	June 2005	Liz Biolley/ Robert Duval
	➤ Monitor system direct service capacity and productivity	Document and implement methodology for measuring direct service capacity and productivity	April 2004	Liz Biolley/ Candace Milow
	➤ Develop data book for MHS	Complete outline and Phase I of Mental Health data book	June 2004	Liz Biolley/ Candace Milow
	➤ Complete the Short-Doyle Medi-Cal Handbook to document all processes related to management of Short-Doyle Medi-Cal revenue	Manual completed and distributed	December 2003	Liz Biolley/ Robert Duval
Reduce IT application costs by 10% by acquiring knowledge of application costs	Beginning July 2003: ➤ Acquire knowledge of application costs ➤ Reduce high cost/low priority applications with minimum disruption of essential services	Reduce application costs by 10%. Beginning 7/1/03, AMH IT Coordinator will review periodic progress updates from the CTO's office	June 2005  June 2005	Liz Biolley/ Robert Duval

Operational Objective	Activities	Measure & Target	Target Date	Lead
Participate in safety education and training to help in the reduction of work-related injuries by 2%	Beginning July 2003: <ul style="list-style-type: none"> <li>➤ Collaborate with Agency HR to coordinate workplace ergonomic assessments/training</li> <li>➤ Develop and implement a workplace safety plan</li> </ul>	Develop plan for safety education for AMHS and coordinate with Agency HR  Safety plan in place	June 2005  June 2005	Karen Hogan
Monitor and reduce energy consumption to 10% below FY 00/01 baseline	Beginning July 2003, develop and monitor energy conservation plans for all HHSA locations	Develop and monitor energy conservation plans for all AMHS sites	June 2005	Karen Hogan
Sustain a 95% level of employee performance reports completed on time	Beginning July 2003, monitor Adult Mental Health Services performance to assure timely completion of performance reports	Develop monitoring plan and follow up to ensure timely completion of performance reports	June 2005	Liz Biolley/ Robert Duval
Close books monthly and participate in reporting Group Financial Condition	Beginning in first full month after Oracle implementation, provide all information necessary for HHSA financial books to close monthly	Monitor to assure monthly closing of books (financial information)	June 2005	Liz Biolley/ Robert Duval
Assist service providers in reducing per unit cost of services by 25%	Ensure that appropriate contract support staff in Adult Mental Health Services participate in Agency Contract Services activities designed to improve Agency contracting processes and procedures	Develop plan to monitor AMHS staff participation in ACS training activities	June 2005	Liz Biolley/ Robert Duval
Reduce the number of classifications in the classified service through consolidation	Beginning July 2003, support DHR's efforts to reduce the number of classifications	Implement plan to reduce number of classifications, in coordination with DHR	June 2005	Liz Biolley/ Robert Duval
Save an amount equal to 1% of salary and benefit costs to reduce ongoing pension costs	Beginning July 2003, monitor monthly to achieve Adult Mental Health Services target	Develop action plan to ensure savings of 1%	June 2005	Liz Biolley/ Robert Duval

<b>Operational Objective</b>	<b>Activities</b>	<b>Measure &amp; Target</b>	<b>Target Date</b>	<b>Lead</b>
Participate in Five-Year Financial Forecasting	Provide all necessary information concerning expenditure and program revenue projections for Five-Year Financial Forecast to FSSD by December 2003	Develop action plan to complete projections for Five-Year Financial Forecast and forward to FSSD	December 2003	Liz Biolley/ Robert Duval
Participate in development and use of environmental scans relevant to the Strategic Plan	Beginning December 2003, use Environmental Scans to revise Agency Strategic Plan and Adult Mental Health Services Business Plan	Monitor to ensure use of environmental scans for revision of current Business Plan	June 2005	Mark Refowitz
Identify specific outcomes needed to measure progress of strategic planning effort	Beginning July 2003, ensure that a designated Assistant Measure Owner and Data Entry User coordinate with SPD to improve the quality of performance measures, reliability of data and alignment with Agency priorities	Action plan to implement improvement strategies in coordination with SPD	June 2005	Liz Biolley/ Candace Milow
Deploy pbViews to track activities aligned to programs centered in the Operational Plan	Refresh quarterly Adult Mental Health Services data for Executive Management measures and add commentary and action plans in pbViews application as appropriate	Monitoring plan to ensure quarterly refresh of AMHS data	June 2005	Liz Biolley/ Candace Milow
Use Performance Management/Balanced Scorecard (BSC) to measure outcomes relevant to the Strategic Plan and Five-Year Financial Forecast	Beginning July 2003, track progress on strategic priorities	Monitor to ensure tracking of Balance Scorecard use	June 2005	Liz Biolley/ Candace Milow
Participate in operational reporting	Beginning July 2003, participate in monthly and quarterly operational reviews	Monitor to ensure participation in monthly and quarterly reviews	June 2005	Mark Refowitz/ Marianne Wedemeyer

Operational Objective	Activities	Measure & Target	Target Date	Lead
Participate in risk identification	Beginning July 2003, institute corrective action plans to mitigate financial and operational risks  Beginning July 2003, monitor the effectiveness of corrective action plans and communicate needed improvements on all Adult Mental Health Services programs to AMHS managers	Identify known risks and develop corrective action plans  Implementation of monitoring plan and communication of needed improvements	June 2005  June 2005	Mark Refowitz/ Marianne Wedemeyer
Promote teamwork/collaboration	Beginning July 2003, on a quarterly basis, address quality of network of care website and prioritize changes/modifications as agreed upon by CMHS and AMHS Team  Beginning July 2003, actively participate on Agency Compliance Committee by attending 80% of all meetings, and serve as liaison to Mental Health Compliance Committee	Monitor quarterly the quality of website (in coordination with CMHS)  Ensure 80% attendance level at Agency Compliance Committee meetings	June 2005  June 2005	Piedad Garcia  Mark Refowitz
Promote communication	Beginning July 2003, conduct a systemwide meeting/quality forum three times per year for all staff under direct report, program managers, and stakeholders  Beginning July 2003, attend 80% of Adult Mental Health Services Management Committee meetings	Ensure that quality forum is held three times per year  Ensure 80% attendance level at Management Committee meetings	June 2005  June 2005	Mark Refowitz/ Jerry Wilkins

Operational Objective	Activities	Measure & Target	Target Date	Lead
Develop a measurable Quality First Program using employee teams to accomplish outcomes contained in the Operational Plan and relevant OIPs	Beginning July 2003: <ul style="list-style-type: none"> <li>➤ Participate in development of annual goals, support tracking and reporting process as needed</li> <li>➤ Establish employee teams to achieve Quality First goals</li> </ul>	Implement effective Quality First strategy and monitor progress	June 2004	Mark Refowitz
		Employee teams in place	June 2004	
Implement HIPAA	Implement standard transaction codes (CPT and ICD9)	InSyst System tables updated; staff training completed; and monitoring plan implemented	October 2003	Liz Biolley/ Robert Duval